

Volunteering Zone User Guide

July 2011

Contents

Organisation Registration	Page 2
Logging in and your Volunteering Zone Account Home Page	Page 6
Creating an Opportunity	Page 7
Creating Opportunity Templates	Page 10
Creating an Event	Page 12
Creating Contacts and Managing User Accounts	Page 14
Creating Branches	Page 17
Volunteering Zone Support and Feedback	Page 19

Organisation Registration

Step 1: Decide What Type of Account

Before you register your organisation on the Volunteering Zone decide what type of account you wish to have. The following options are available:

- **Standard Volunteering Zone Account:** This account gives you access to the Volunteering Zone to manage and publish your volunteer opportunities and events on Volunteer Scotland. In addition, you can also create branches for your organisation. Please note that the branch function is **only** available on the standard Volunteering Zone account.
- **Event Team Scotland Volunteering Zone Account:** This account will give you access to the Volunteering Zone to manage and publish your volunteer opportunities and events on Volunteer Scotland, but you will also have access to a list of events volunteers. This type of account is **only** appropriate for organisations with one-off events that recruit volunteers to help run them. Please be aware that you cannot create branches with this account.

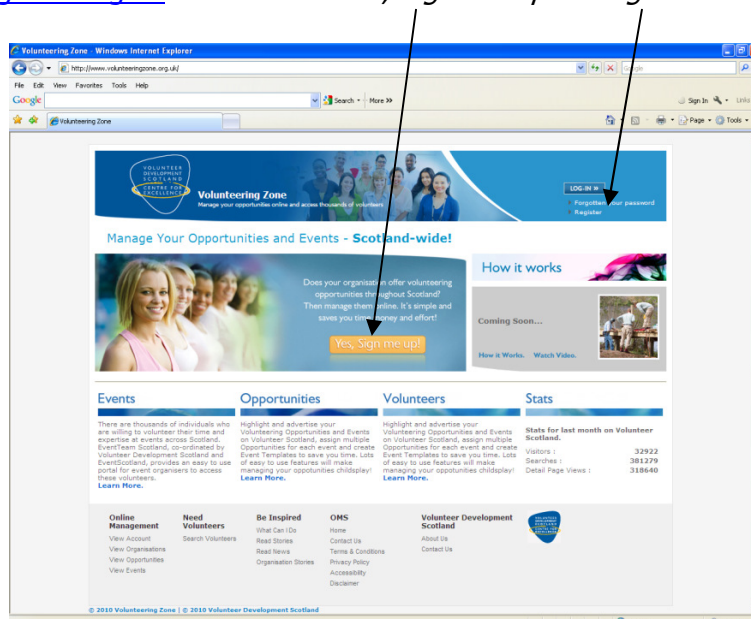
If your organisation operates using a branch structure but would also require access to the list of events volunteers, we recommend that you register for both the standard and Event Team Scotland Volunteering Zone accounts. If you're still not sure what account(s) would suit you best, please contact Rebecca Dadge at VDS. See contact information at the end of this document.

Step 2: Begin Registration

Depending on the type of Volunteering Zone account you wish to have, please select the appropriate registration route:

- **Register for Standard Volunteering Zone Account**

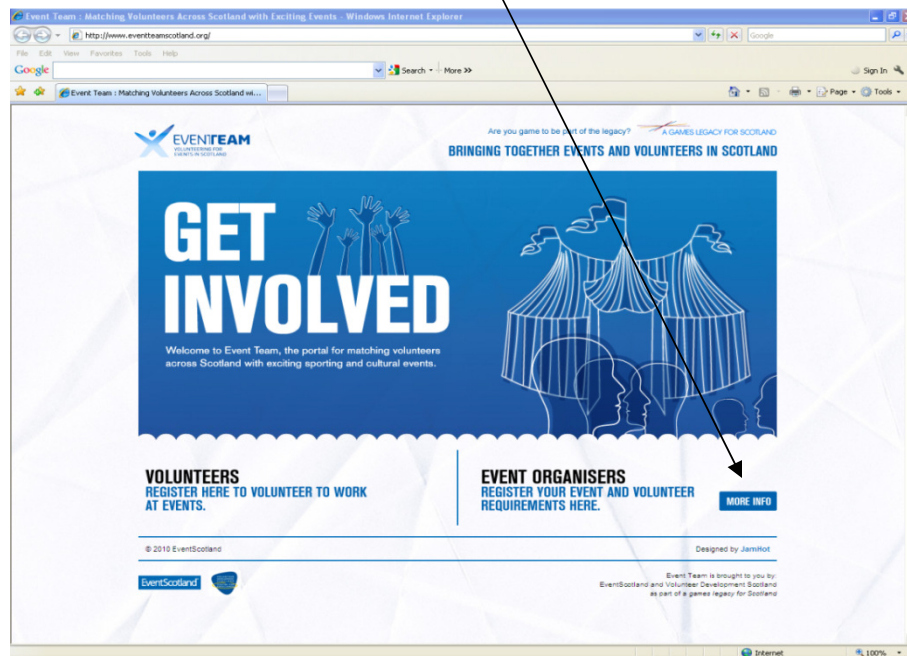
To register for the standard Volunteering Zone account, go to the Volunteering Zone homepage www.volunteeringzone.org.uk and click on *Yes, Sign Me Up* or *Register*.



This will open the registration form to apply for standard account on the Volunteering Zone.

- **Register for Event Team Scotland Volunteering Zone Account**

To register for the Event Team Scotland Volunteering Zone account, go to www.eventteamsotland.org and click on the *More Info* button to begin your registration.



This will display a smaller information screen at which you should press the *Start Registration* button. You will be directed to the registration screen below asking for the name of your organisation and email address.

On submitting this information you will receive an authentication email which will provide you with a link to complete your registration. Please use this link to begin your Event Team Volunteering Zone registration.

Step 3: Completion of Registration Form

Once you begin registration using the appropriate option(s) in Step 2, the registration form will open for you to create your account on the Volunteering Zone.

Register for Volunteering Zone

Please complete the application form to apply for an account that will enable you to manage and monitor Opportunities and Events on Volunteer Scotland.

Password should contain 7 or more characters, both upper and lower case, and at least 1 numeric character(s)

* Required Fields

Progress 1 2 3 4 5 6 7

Organisation Name *

(255 characters remaining)

Department

(255 characters remaining)

Email *

(255 characters remaining)

Website

(255 characters remaining)

Phone

(255 characters remaining)

Fax

(255 characters remaining)

Cancel Next

Throughout the form you will be asked to provide the following information:

- **Organisations details:** Organisation name and main contact e-mail and phone number
- **Main contact:** This will be the default contact for your organisation
- **About your organisation:** The information you provide here will be published on Volunteer Scotland
- **Volunteering details:** Why you involve volunteers, policies and recruitment methods used
- **Address details:** Your organisations main address
- **Account details:** This is where you create your login details

Continue through the registration pages, clicking *Next* as you complete each page about your organisation. Please note that when registering for an Event Team Scotland account, some fields may display default sample EventScotland text which should be replaced with your own organisation's details.

All fields marked with a red asterisk indicate essential information that is required to complete the registration.

* Required Fields

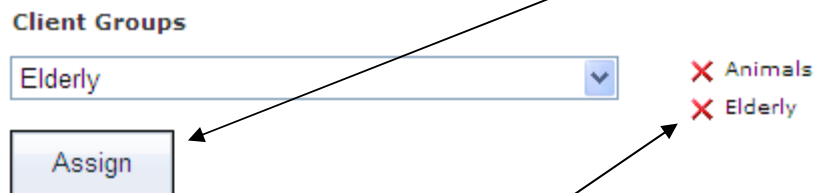
Organisation Name *

(255 characters remaining)

Using the Assign Button

On page 4 of the registration form you are asked to confirm the relevant *Client Groups* for your organisation and the *Assign* button is shown below this field. This button indicates that more than one option can be selected.

- To assign a client group select the option from the list and click on *Assign*



The screenshot shows a form titled "Client Groups". Below the title is a dropdown menu with "Elderly" selected. To the right of the dropdown is a blue arrow icon. Below the dropdown is a button labeled "Assign". To the right of the "Assign" button is a list of two items: "Animals" and "Elderly", each preceded by a red "X" icon. An arrow points from the "Assign" button to the "Animals" item, and another arrow points from the "Elderly" item to the "Assign" button.

- To remove a selected client group click on the red cross

On completion of the form you will be directed back to the home page and a message will be shown at the top of the page to confirm your information has been received and will be approved shortly. You will also receive a confirmation e-mail.

Logging in and your Volunteering Zone Account Home Page

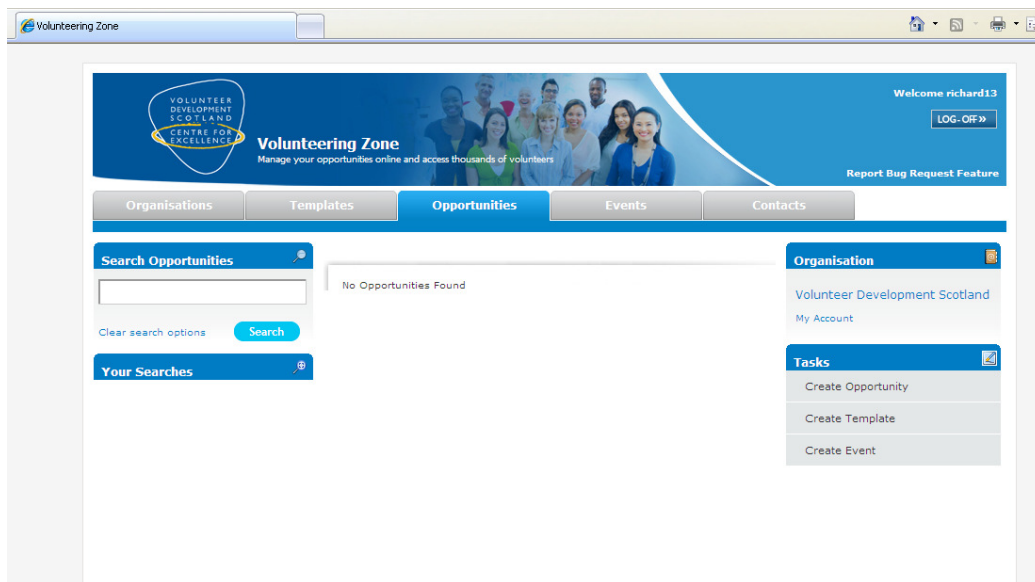
Once your account has been approved you will receive an e-mail confirming your username and password and a link to the login page.

To access your account:

1. Click on the link in your confirmation email or go to www.volunteeringzone.org.uk
2. Click on the *Log-In* button located at the top right of the screen.
3. Enter your username and password

Your Account Home Page

Below is an example of the standard Volunteering Zone account home page.



Tabs and Functions:

- **Organisations:** View or edit your organisations details and manage settings and [lookups](#). If you have a standard Volunteering Zone account you can also register or invite [branches](#) here.
- **Templates:** Create, view and edit templates you have created for volunteering opportunities. Various permissions can be given to branches to create opportunities from templates and create their own opportunities.
- **Opportunities:** View and edit volunteer opportunities.
- **Events:** View and edit events. (Remember, these are for events that require volunteers to help run them, not for participants e.g. fun runners, bungee jumpers, walkers etc.)
- **Contacts:** Create and manage contacts and [user account roles/permissions](#).
- **Tasks:** Create Volunteer Opportunities, Templates and Events (other tasks may be shown depending user permissions and also the tab that you are viewing)

Creating an Opportunity

To create a volunteering opportunity, select *Create Opportunity* from the Tasks list shown to the right of the screen.



This will open the opportunity form where you will be asked to provide the following information about the opportunity:

- **Details:** Title, description, images and web links.
- **About:** Client groups, work types, tagging, skills and requirements.
- **Timing:** When the opportunity will take place and information on availability and frequency.
- **Restrictions:** Any restrictions e.g. age restrictions.
- **Training:** Information on any training provided and details of expenses.
- **Location:** Information about the location of where the opportunity will take place and travel details. Please remember, you can **only** register where the volunteer role actually takes place. Volunteers search by town or postcode so registering opportunities where they do not take place raises expectations that cannot be met. Your opportunity will be removed if you register in an area where it does not take place.
- **Contact:** Contact(s) for the opportunity.
- **Event:** This section will allow you to link the opportunity to an event. For instance, you might have Marshals, First Aiders etc for an event and these can all be linked together.
- **Volunteer Scotland Details:** When you want the opportunity to be published on Volunteer Scotland.

Searchable Fields

Within an opportunity record there are specific fields that are searchable on the Volunteer Scotland website and these include:

- Title
- Description
- Client Groups
- Work Types
- Tagging (keywords used to describe your opportunity)

This information will assist volunteers when searching for opportunities on Volunteer Scotland, and it is important to take this into consideration when creating an opportunity.

Assigning Images

You can assign your own images to an opportunity by clicking on *Assign Images*. This will open the *Image Manager* window and will allow you to upload and select images.

Images

Allowed files: .gif .jpeg .jpg .png

Maximum file size: 4Mb

Images will be shown in the dimensions 231 x 205 pixels

Assign Images

The maximum file size for an image is 4 MB and it is recommended that you resize the image to fit the dimensions shown before uploading it onto the Volunteering Zone. This will help to prevent the image from being resized once uploaded.

Assigning Web Links

To assign web links enter your website address into the *URL* field.

You can give your link a *Title* and this will be shown on the details page of the opportunity. Information you enter in the *Tooltip* field will appear to volunteers when hovering their mouse over the link.

Click on *Assign Link* to add the link to the opportunity. Any links you add will be saved to the lookup list for future use and you can view them by clicking on the button to the right of the URL field.

Web Links

Url:

www.vds.org.uk

Title:

VDS

Tooltip:

Link to VDS website

Assign Link

Lookup List Fields

Some of the drop-down list fields within the form also give you the option to type in your own text. An example is shown in the *Tagging* field below.

Tagging

Enter or Select (5 available)

X Football

Assign

To add a new tag, enter the text in the field and then click on *Assign*.

The new tag you have assigned will be saved in the lookup list for this field for future use. You can view the options available in the list by clicking on the button to the right of the tagging field. Options shown in all lookup lists can be managed by clicking on the option for *Manage Lookups* in the Organisations tab.

Opportunity Tasks

Once you have fully completed the opportunity form click on *Create*. You will be directed to the details page for your opportunity. This shows all the information that will be displayed on Volunteer Scotland.

The screenshot shows the 'Opportunities' tab selected in the top navigation bar. The main content area displays details for the 'Dodgeball Assistant Coach' opportunity. On the left, a 'Status' box shows 'InProgress' with a progress bar and dates: Entered: 20/10/2010, Modified: 18/04/2011, First Published: 18/04/2011, Start: 01/11/2010, End: Ongoing: True, Post On: 20/10/2010, Remove On: 20/04/2011. Below this is 'Additional Info' with logos for the Scottish Government, Scottish Football Federation, and others. A 'Volunteer Scotland Stats' box shows 'Page Views: (5)' and 'Requested Info: (0)'. The main content area includes a photo of a person playing dodgeball, an 'About Opportunity' section describing the role, and an 'About Scottish Dodgeball Association' section. On the right, a 'Tasks' sidebar lists actions: Publish Opportunity, Delete Opportunity, Edit Opportunity, Create Template From Opportunity, Create Opportunity, Create Template, and Create Event. An arrow points from the 'Publish Opportunity' task to the 'Publish' button in the 'Tasks' bar.

Once you have created an opportunity the following tasks will be listed in the *Tasks* bar:

- **Publish/UnPublish Opportunity:** The opportunity will be automatically published to Volunteer Scotland according to the date you have entered in the *Post On* field. You can override this by clicking on *Publish Opportunity* in the Tasks list. To remove an opportunity from Volunteer Scotland click on *Take Offline* in the Tasks bar or click on the *UnPublish* icon shown against the opportunity in the Opportunity tab list.
- **Delete Opportunity:** Permanently deletes the opportunity from the Volunteering Zone and Volunteer Scotland. Once deleted an opportunity cannot be re-instated. If you do wish to remove an opportunity from Volunteer Scotland but intend to use it in the future, you should select the option to Unpublish / Take Offline rather than Delete. By doing this your opportunity will remain on the Volunteering Zone but will be removed from view on the Volunteer Scotland website.
- **Edit Opportunity:** This will open the opportunity form which allows you to edit details in any of the opportunity fields. To save any changes made click *Save*. To publish the changes to Volunteer Scotland click on *Publish Opportunity*.
- **Create Template from Opportunity:** This will create a new opportunity template using the details of the existing opportunity. You can set the permissions for each field within the template to manage what information can be changed by users. Once the template has been created users can then create opportunities from the template. [Click here](#) for more information on templates.

The tasks listed above will also be shown as icons against each opportunity listed in the *Opportunity* tab.

The screenshot shows the 'Opportunity' tab with a list of opportunities. The first opportunity is 'Dodgeball Assistant Coach' by 'Scottish Dodgeball Association'. It shows a status of 'InProgress', a date of '20/10/2010', and a button for '5 Views On VS'. An arrow points from the 'Publish Opportunity' task in the previous screenshot to the 'Publish' icon (a green checkmark) next to the opportunity.

Creating Opportunity Templates

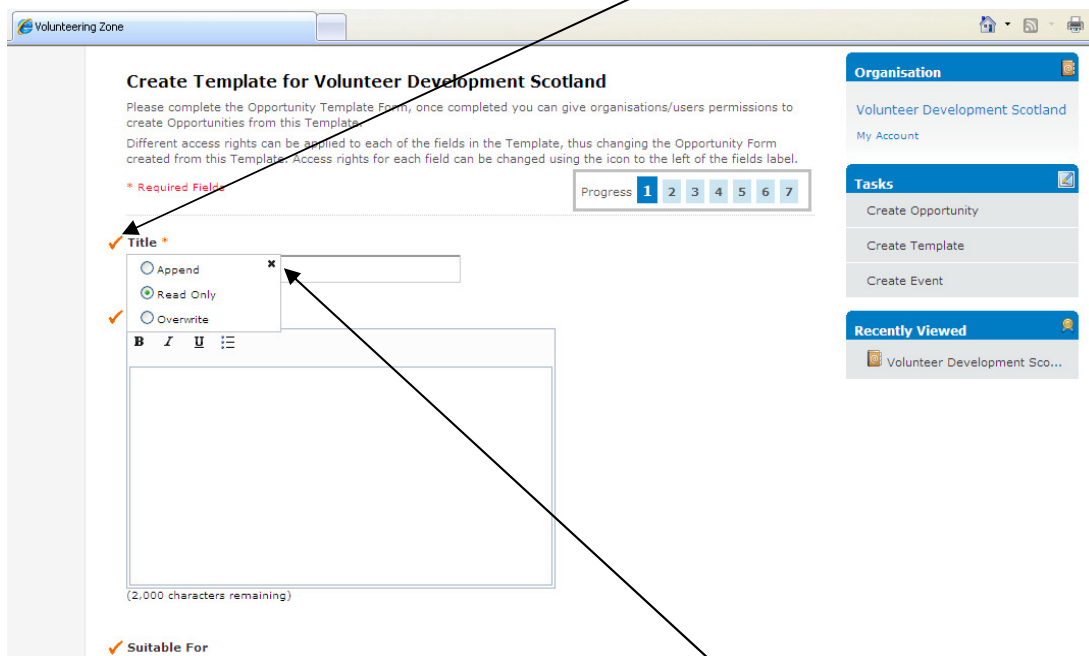
Creating opportunity templates will allow other users of your Volunteering Zone account to create opportunities from a template. This keeps a level of control for the parent organisations but also ensures consistency for similar or identical roles.

To create a template click on *Create Template* in the task bar.






This will open the opportunity template form for you to complete with details about the opportunity. The template includes all the fields shown in the standard opportunity form.

Within the template form you can set the permissions for each individual field. By default all fields are set to *Read Only*. To change the permission for a field, click on the orange tick shown to the left of the field and select the relevant permission from the list.



When you have selected the permission for the field, click on the cross to close the list.

Depending on the permissions you set for each individual field, users can do the following when creating an opportunity from a template:

-  **Append:** Users can add text but cannot remove any existing text entered by the template creator.
-  **Read Only:** Fields marked as read only cannot be changed by users.
-  **Overwrite:** Users can change/overwrite any information shown in the template field.

Continue through the template form completing all relevant fields ensuring that you have set the correct field permissions. On completion of the form, click on *Create* to save the template.

The template details screen will be displayed giving you an overview of the details and permissions set for each field of the new template.

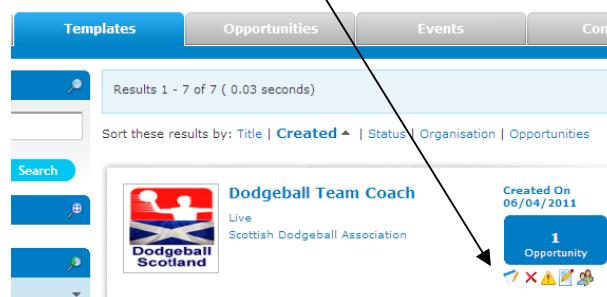


Template Tasks

Now that you have created your template the following tasks will be listed in the *Tasks* bar:

- **Assign Opportunity Creators:** If you have a standard Volunteering Zone account with branches, you can assign specific branches as opportunity creators. Only the branches you have selected will have access to your template.
- **Suspend Template:** The status of the template will be shown as *Suspended* and as a result users will be unable to create any new opportunities from the template (template can still be edited by those that have permission to do so). To re-activate the template for use click on the option to *Unsuspend Template*.
- **Create Opportunity From Template:** Create a new opportunity using the selected template.
- **Delete Template:** Permanently deletes the template from the Volunteering Zone.
- **Edit Template:** any information/fields within the template.

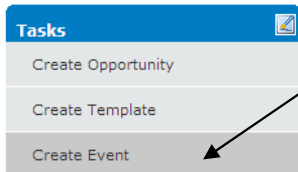
The tasks listed above will also be shown as icons against each template listed in the *Templates* tab. Depending on individual access permissions, certain tasks may not be visible for all users.



Creating an Event

Creating and publishing an event allows volunteers to search for and view details of your event on Volunteer Scotland website. It also acts as an umbrella for any opportunities you may have that are linked to the event. This is for events where volunteers are engaged to help make it happen e.g. Marshals, First Aiders etc. It is not to publicise for participants who are asked to raise money by running, walking, bungee jumping etc.

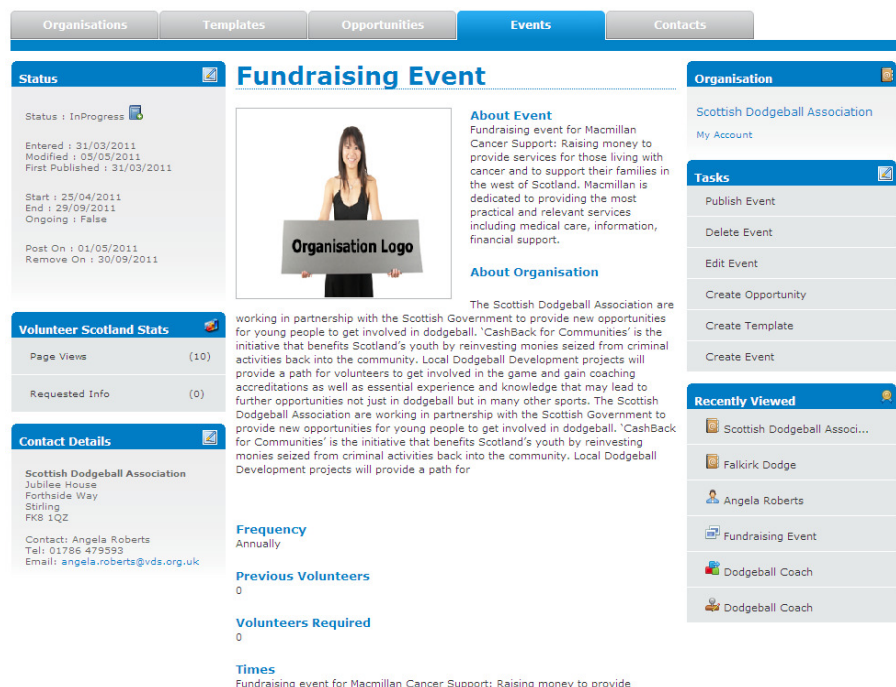
To create an event click on the *Create Event* option on the right hand side task bar of your home screen.



This will open the event form where you will be asked to provide the following information about the opportunity:

- **Details:** Title, description, tagging, images and web links
- **Timing:** When the event will take place
- **Location:** Information about the location of where the event will take place
- **Contact:** Contact(s) for the event
- **Opportunities:** This section will allow you to link the event to volunteering opportunities
- **Volunteer Scotland Details:** When you want the event to be published on Volunteer Scotland

Once you have fully completed the event form click on *Create*. You will be directed to the details page for your event. This shows all the information that will be displayed on Volunteer Scotland.



Organisations **Templates** **Opportunities** **Events** **Contacts**

Status

Status : InProgress

Entered : 31/03/2011
Modified : 05/05/2011
First Published : 31/03/2011

Start : 25/04/2011
End : 29/09/2011
Ongoing : False

Post On : 01/05/2011
Remove On : 30/09/2011

Volunteer Scotland Stats

Page Views (10)

Requested Info (0)

Contact Details

Scottish Dodgeball Association
Jubilee House
Forthside Way
Stirling
FK8 1QZ

Contact: Angela Roberts
Tel: 01786 479593
Email: angela.roberts@vds.org.uk

Fundraising Event

Organisation Logo

About Event
Fundraising event for Macmillan Cancer Support: Raising money to provide services for those living with cancer and to support their families in the west of Scotland. Macmillan is dedicated to providing the most practical and relevant services including medical care, information, financial support.

About Organisation
The Scottish Dodgeball Association are working in partnership with the Scottish Government to provide new opportunities for young people to get involved in dodgeball. 'CashBack for Communities' is the initiative that benefits Scotland's youth by reinvesting monies seized from criminal activities back into the community. Local Dodgeball Development projects will provide a path for volunteers to get involved in the game and gain coaching accreditations as well as essential experience and knowledge that may lead to further opportunities not just in dodgeball but in many other sports. The Scottish Dodgeball Association are working in partnership with the Scottish Government to provide new opportunities for young people to get involved in dodgeball. 'CashBack for Communities' is the initiative that benefits Scotland's youth by reinvesting monies seized from criminal activities back into the community. Local Dodgeball Development projects will provide a path for

Frequency
Annually

Previous Volunteers
0

Volunteers Required
0

Times
Fundraising event for Macmillan Cancer Support: Raising money to provide

Organisation

Scottish Dodgeball Association
[My Account](#)

Tasks

Publish Event
Delete Event
Edit Event
Create Opportunity
Create Template
Create Event

Recently Viewed

Scottish Dodgeball Associ...
Falkirk Dodge
Angela Roberts
Fundraising Event
Dodgeball Coach
Dodgeball Coach

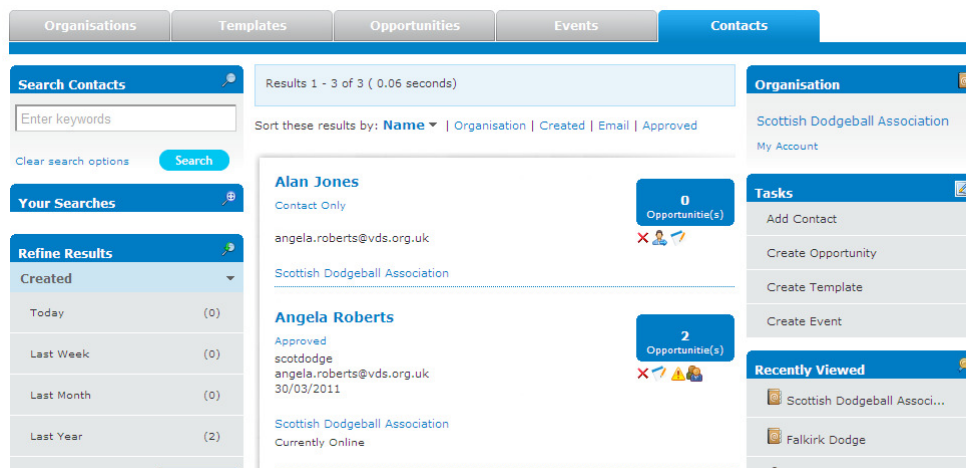
Once you have created an event the following tasks will be listed in the *Tasks* bar:

- **Publish/UnPublish Event:** The event will be automatically published to Volunteer Scotland according to the date you have entered in the *Post On* field. You can override this by clicking on *Publish Event* in the Tasks list. To remove an event from Volunteer Scotland click on *Take Offline* in the Tasks bar or click on the *UnPublish* icon shown against the event in the Event tab list.
- **Delete Event:** Permanently deletes the event from the Volunteering Zone and Volunteer Scotland.
- **Edit Event:** This will open the event form which allows you to edit details in any of the event fields. To save any changes made click *Save*. To publish the changes to Volunteer Scotland click on *Publish Event*.

The tasks listed above will also be shown as icons against each event listed in the *Event* tab.

Contacts and Managing User Accounts

When first registering on the Volunteering Zone, a contact record would have been created for the main organisation contact/administrator, and you can view this by clicking on the *Contacts* tab. All contacts for the organisation will be shown in this tab.

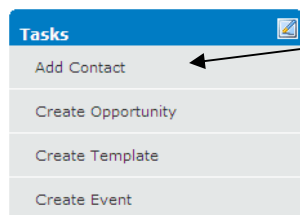


Within the Volunteering Zone there are two types of contacts:

- **User Account Contact:** Contacts with user accounts can login to the Volunteering Zone and create opportunities/events for your organisation. You can assign different permissions for each individual contact for opportunity, event and template management.
- **Contact Only:** This type of contact does not have a Volunteering Zone user account but can be assigned as a contact for opportunities or events. Once this type of contact has been added you can update it at any point to have a user account for logging in to the Volunteering Zone.

Create User Account Contact

To create a new contact with a Volunteering Zone user account, click on the option for *Add Contact* in the Contacts or Organisations tab tasks list.



This will open the contacts form and you will be asked to provide the following information:

- Contact Name
- Phone Number
- Position
- Username
- E-mail Address
- Password

Once you have completed the form click on the *Add* button to create the new user account contact. This will save the details and add the contact to the list shown in the *Contacts* tab (status will be shown as *Approved*). The user will receive an e-mail confirming that their account has been created and will include their username and password along with a link to login to their account.

Create Contact Only

This type of contact can only be added when creating a new opportunity or event. In the *Contacts* page of the opportunity or event form, enter the details of the new contact into the contact fields and click on *Assign*.

Create Opportunity for Scottish Dodgeball Association
Please complete the Opportunity form, once completed the Opportunity will need to be published before it appears on Volunteer Scotland

* Required Fields

Progress 1 2 3 4 5 6 7 8 9

Contacts

First Name:
George

Last Name:
Graham

Email:
info@scotdodge.org

Phone:
01786 849777

Assign

Back Create Cancel Next

Once assigned the details of the contact will be saved and shown in the contacts lookup list for future use. The contact will also be listed in the *Contacts* tab as *Contact Only*.

To upgrade the contact to a User Account Contact, click on the *Contacts* tab and click on the icon located to the right of the contact name for *Create User Account*.

Alan Jones
Contact Only
angela.roberts@vds.org.uk
Scottish Dodgeball Association

0 Opportunities

After clicking on the icon a validation message will be shown confirming that you wish to create a user account for the contact. By clicking Yes, the contacts form will open which you should complete with the contacts details and user account information (some information will already be populated).

Managing User Accounts

Within the Contacts tab the following tasks will be shown in the *Tasks* bar for the main administrator/contact:

- **Delete Contact:** Permanently deletes the contact from the Volunteering Zone.
- **Edit Contact:** This will open the contact form where you can edit details of the contact. To save any changes made to the contact click *Save*.
- **Suspend:** The status of the contact will be shown as *Suspended* and as a result the users will be unable to access their account on the Volunteering Zone. To re-activate the contact for use click on the option to *Unsuspend*.
- **Manage Roles:** This will open the *Manage Roles* page where you can set the roles/access permissions for each user account. To select a role for a user, click on the box shown to the left of each option and click on *Save* (you can select more than one option).

Manage Roles
Please select the roles for Contact : scotdodge

Select All Select None

Account Administration
☒ Full Control ⓘ

Templates
☒ Full Control ⓘ

Opportunities
☒ Create Standalone ⓘ
☐ Create from Template ⓘ

Events
☒ Full Control ⓘ

Save Cancel

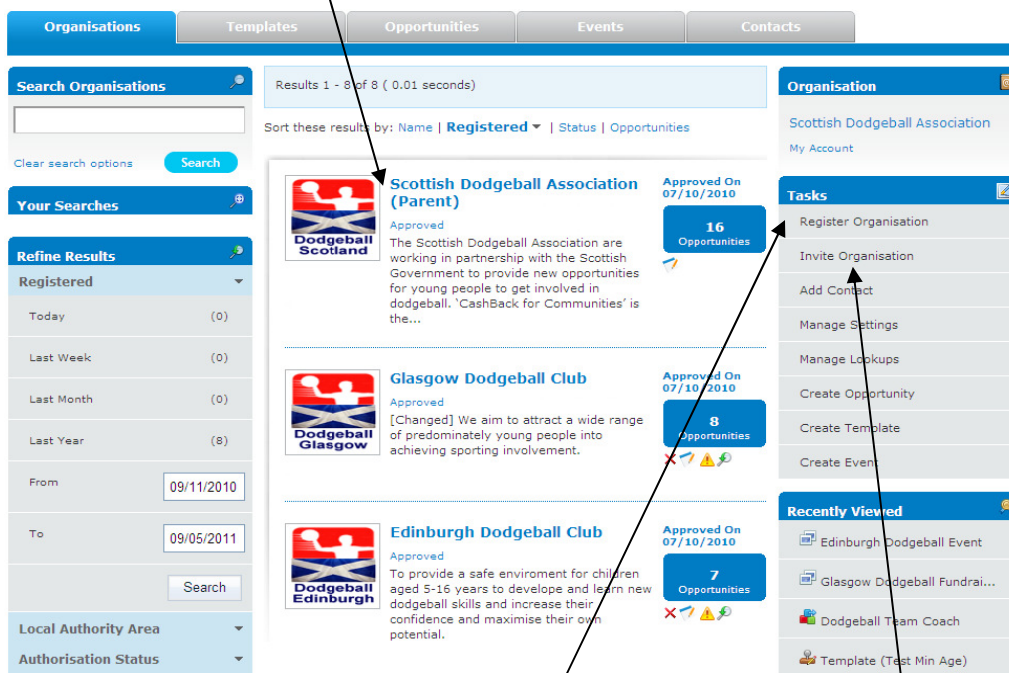
You have the option to set the following roles for each user:

- **Account Administration (Full Control):** This gives the user full control of your organisation and related organisations (branches). They can register and invite organisations, manage settings and lookups, create, edit and delete Templates/Opportunities/Events.
- **Templates (Full Control):** Full control of organisations templates. Can create, edit and delete templates, and grant other branch organisations access to templates.
- **Create Standalone Opportunities:** Full control of organisations opportunities. Can create, edit and delete opportunities.
- **Create Opportunities from Template:** Can create opportunities from a template and edit opportunities that were created from a template.
- **Events (Full Control):** Full control of organisations events. Can create, edit and delete events.

Creating Branches (Standard Volunteering Zone Account Only)

The branch function is only available with the standard Volunteering Zone account. If you have an Event Team Scotland Volunteering Zone account only, but would like to operate using a branch structure, you can register for a separate standard account using the standard registration route on page 2.

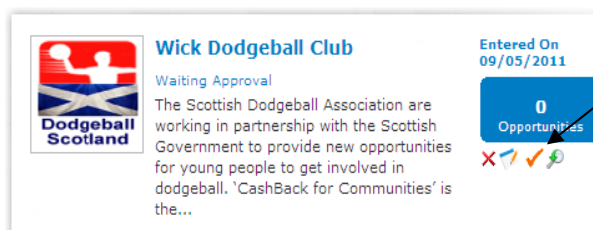
If your organisation is registered on the Volunteering Zone with the standard account, you will have the option to add branch organisations to your account to allow them to manage their own local opportunities. The main organisation acts as the *Parent* and maintains full control and can view all activity (organisations, templates, opportunities and events).



When creating a branch organisation you can either *Register Organisation* or *Invite Organisation*:

- **Register Organisation:** This will open the organisation form for you to complete with all the details about the branch organisation. This is the same form that you would have completed for your initial registration on the Volunteering Zone (some fields may be populated with information taken from the parent organisation but this can be changed).

On completion of the form click *Register* to save the details of the branch organisation. The new branch will be shown in the *Organisations* tab as *Waiting Approval*. Click on the orange tick to *Approve Organisation*.



Once approved the branch organisation will receive an e-mail confirming their username and password and a link to the login page.

- **Invite Organisation:** This will open the invite form for you to complete with the branch organisations name and e-mail address.

Invite Organisation
Send out an invite to one of your organisations to allow them to manage their Opportunities.

* Required Fields

Organisation Name *

(255 characters remaining)

Email *

(255 characters remaining)

Click on the button to *Send Invite* and this will send an e-mail invitation to the branch which will include a link for them to complete the registration form. When an invite has been sent to an branch organisation, the branch will be listed in the *Organisations* tab and the status will be shown as *Invited*.

When the branch organisation has completed the registration process the status will change to *Waiting Approval*. To approve the branch, click on the *Approve Organisation* icon/option. An e-mail will then be sent to the new branch confirming their username and password and a link to the login page.

Volunteering Zone Support and Feedback

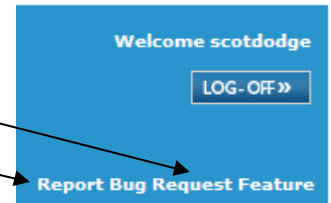
Not sure about what type of account to register for?

Please e-mail rebecca.dadge@vds.org.uk for guidance with registration.

Report a Bug or Request Feature

To report any bugs or errors within the Volunteering Zone or request a new feature, click on the option for either *Report Bug* or *Request Feature* shown at the top right of the screen.

On selecting one of the options, the relevant form will open for you to complete with your contact details and information about the bug/feature. On completion of the form click on save to submit the information.



Feedback

We want the new Volunteering Zone service to be of maximum benefit to you and your organisation and encourage you to give us any feedback about your experience of using the new service, so we can improve it for future users. Please e-mail your feedback to angela.roberts@vds.org.uk